Horizon
Inventory
User's and Administrator's Guide

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NOTE

Percon PT 2000 and Percon TopGun are now called simply PT 2000 and TopGun. This guide still uses the old product names. You will see the new names in the documentation that you receive in the future.

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This document is compatible with Horizon Version 7.3. It may also be compatible with later versions.

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I N D E X

Chapter 1

Getting Started

This chapter provides you with the basic information you need to begin using Horizon Inventory. It gives you an overview of this guide, a review of some basic Horizon tasks and the Launcher interface, and an overview of Inventory.

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Welcome

Welcome to Horizon Inventory. Inventory helps your library track items from all areas of the library and determine when items are missing or in the wrong place.

About This Guide

The *Inventory Guide* is for all library personnel who do inventory and for system administrators who set up Horizon Inventory and any peripheral machines, such as Telxon or Percon hand-held computers. This guide explains how to set up Inventory, workstations, and hand-held computers to take inventory. It also explains how to use Inventory and hand-held computers to take inventory, process inventory data, and find and resolve inventory exceptions.

All setup and administration-related topics that are specific to Inventory are covered in this guide, not in the *System Administration Guide*.

This section explains these topics:

- Chapters
- Online Guides and Web Updates
- Feedback
- Disclaimer
- Conventions

Chapters

This guide contains these chapters and major sections:

- Chapter 1, "Getting Started," explains the basic information you need to begin using Inventory, and gives you an overview of this guide.
- Chapter 2, "Planning Inventory," explains some benefits of planning ahead. It gives some suggestions on planning for time, personnel, and other resources to make your inventory complete and accurate. It also suggests planning which items you want to count as exceptions, dividing collections into manageable groups to keep from being bogged down by too much information at once, choosing the methods and equipment you will use to collect the information, and developing a method to track progress.
- Chapter 3, "Inventory Setup," explains how the system administrator sets up Horizon Inventory tables to tally the inventory inputs and track exceptions. It also explains how to set up hand-held computers.
- Chapter 4, "Taking Inventory," explains how to record item barcodes and in which order to do Inventory tasks. (For example, you should count shelving cart items before shelved items. If you count shelved items before shelving cart items, then as the shelving cart items are put back on the shelves, those items placed where the inventory has already been counted are missed by the inventory and show up as missing from inventory counts.)

- Chapter 5, "Resolving Inventory Issues," explains how to run reports to show inventory exceptions and how to use those reports to find missing or misshelved inventory, items in the wrong collection, or any other exception.
- Index to the guide.

Online Guides and Web Updates

In addition to the printed copy, this guide is available as a PDF (Portable Document Format) file. You can access the most current PDF version of this guide at Dynix's customer web site at "customer.dynix.com". Accessing the Horizon Documentation site on the Web requires a login and password. If you do not already have a login and password, contact your system administrator.

To view any PDF file, you must install Adobe's Acrobat Reader on your workstation. (This software is provided by Adobe free of charge.) You can download the latest version of Acrobat Reader from Adobe's web site at "www.adobe.com".

Feedback

The Documentation Team at Dynix wants to provide you with the most complete and useful documentation possible. If you have any comments about this guide, please let us know. We appreciate your feedback and we will use it to improve future versions of the guide. You can send your comments via e-mail to "hdocs@dynix.com". If you need immediate assistance, contact your system administrator.

Disclaimer

The process names and sample windows in this guide reflect the default settings that are delivered with most new Horizon installations. The settings on your system may be different from these defaults, depending on your library's implementation choices and the way your system administrator sets up your Horizon system. (For example, your system administrator can add fields to windows, reorganize the processes that display on the navigation bar, and set up security to limit access to certain processes.)

Additionally, as you use Horizon, you can resize windows or customize your Launcher workspace. Consequently, your Horizon environment may look and function differently than the environment described in the tasks in this guide. (For information about customizing and restoring window size or the Launcher workspace, see the *Launcher Configuration Guide*.)

Conventions

This section explains the documentation conventions used in this guide.

Mouse Conventions

- **Click.** To place the mouse pointer on an icon, command, or button and quickly press and release the primary (usually the left) button once.
- **Double-click.** To place the mouse pointer on an icon, command, or button and quickly press and release the primary mouse button twice.
- **Right-click.** To place the mouse pointer on an icon, command, or button and quickly press and release the secondary (usually the right) button.
- **Drag.** To press and hold the primary mouse button while moving the mouse.
- **Choose.** To select an option from a menu, group of options, or list.
- **Highlight.** To click once on an option in a list so the option is selected and displays in reverse video. In a field, you may drag the mouse over text to highlight that text.

Keyboard Conventions

- Keys on the keyboard are shown in uppercase, bold characters (for example, "the **TAB** key"). The keys on your keyboard may not be labeled exactly as they are in this guide.
- When you are instructed to press two or more keys at the same time, the keys are connected by a plus sign. (For example, **ALT+H** means to hold down the **ALT** key and press the **H** key.)
- Text or numbers that you are instructed to enter using the keyboard are enclosed in quotation marks (for example, enter "main" in the **Location** field).

General Conventions

- In step-by-step instructions, the names of menus, buttons, fields, and other options appear in bold typeface (for example, "the **OK** button" or "the **Borrower** field").
- When you are instructed to choose an option from a menu, the menu and menu options are separated by commas. (For example, "choose **File, Save**" means to choose the File menu, then choose the Save option from the menu.)
- Text in italics shows general information that you must replace with information that is specific to your system. (For example, you would replace *password* with a specific password, such as 123gr@ndma.)

Horizon Basics

This guide assumes that you have a basic knowledge of your Windows operating system, Horizon, and working in Horizon windows. At the minimum, you should know how to:

- Use a mouse or keyboard to do basic tasks, such as choosing menu options and buttons.
- Work with windows (selecting, moving, minimizing, restoring, maximizing, sizing, scrolling, closing, and so on).
- Work with dialog boxes.
- Log in to Horizon, change operators, and log off Horizon.
- Search for records on the Horizon system.
- Work in Horizon list and edit windows.

NOTE

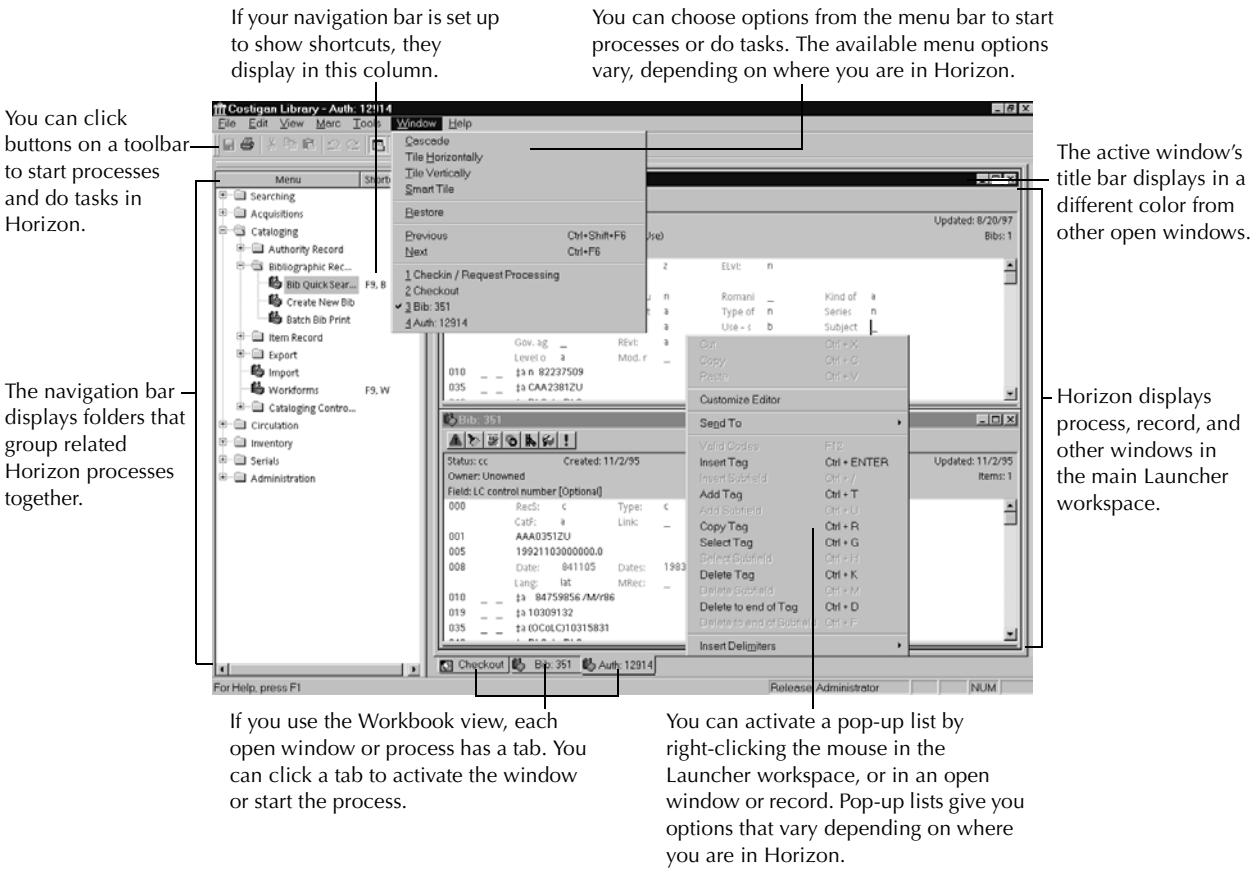
If you do not know how to do these tasks, see the Windows online help, your Microsoft Windows manual, or the *Horizon Basics Guide*.

Additionally, you need to understand how to use the Launcher environment. The Launcher is the framework that you use to open and navigate through the various Horizon processes. You can also use it as a tool to access some of your other desktop functions.

The Launcher workspace starts automatically when you first log in to Horizon. It includes pop-up lists, toolbars, and a navigation bar that help you do tasks easily. You or your system administrator can customize toolbars, the navigation bar, and some other features of the Launcher environment.

Here is an example of a Launcher workspace:

Figure 1.1: Launcher Workspace


If your navigation bar is set up to show shortcuts, they display in this column.
You can choose options from the menu bar to start processes or do tasks. The available menu options vary, depending on where you are in Horizon.
You can click buttons on a toolbar to start processes and do tasks in Horizon.
The active window's title bar displays in a different color from other open windows.
The navigation bar displays folders that group related Horizon processes together.
Horizon displays process, record, and other windows in the main Launcher workspace.
If you use the Workbook view, each open window or process has a tab. You can click a tab to activate the window or start the process.
You can activate a pop-up list by right-clicking the mouse in the Launcher workspace, or in an open window or record. Pop-up lists give you options that vary depending on where you are in Horizon.

For more information on working in the Launcher environment, see the *Horizon Basics Guide*.

This section explains these topics:

- Starting a Horizon Process
- Customizing the Launcher

Starting a Horizon Process

When you do a task in Horizon, you must first start the process that lets you do the task. If you have already started several processes, you can activate the open process window that you want to use. The active window's title bar displays in a different color from other open windows. If the windows are displayed in a cascade, the active window moves to the front.

NOTE

If you cannot activate a different window, the currently active window needs attention before you can continue. You must either close the window, or cancel or finish its process. (For example, if the window is a search window, you must complete the search, cancel the search, or close the window before you can start a different process.)

Horizon lets you use several different methods to start most processes. The various tasks in this guide usually give only one or two of the methods. As you work with Horizon, you will discover which methods are most convenient for you.

For example, if you work best using a mouse, you may choose to use the menu bar to start processes. If you prefer using a keyboard, you may choose to use keyboard shortcuts.

NOTE

Your security settings and Launcher configuration may affect the options that you can use to start some processes. (For more information, see your system administrator.)

This section explains some of the methods you can use to start a process in Horizon. (For examples of some of these methods, see Figure 1.1, "Launcher Workspace," on page 1-7.)

This section explains these topics:

- Starting a Horizon Process Using a Mouse
- Starting a Horizon Process Using a Keyboard

Starting a Horizon Process Using a Mouse

When you use the mouse to start a process, you click or double-click on a specific part of the Launcher workspace. Here are some of the ways you can use a mouse to start a process:

- **Double-click on a process or tool on the navigation bar.** The navigation bar stores processes and tools in folders. (For more information, see "Horizon User Interface" chapter of the *Horizon Basics Guide*.)
- **Click on a toolbar button.** You can use the toolbar to start a process only if you (or your system administrator) have added a button for that process. (For more information, see the "Customizing the Toolbar" chapter of the *Launcher Configuration Guide*.)
- **Click on an option from the menu bar.** Choose **Window** and the open window or record that you want to make active.
- **Click on the window that you want.** If you can see part of the window or record that you want to make active, click on the window.
- **Use the Workbook view.** Click on the tab of the open window or record that you want to make active. (For instructions on opening the Workbook, see the "Horizon User Interface" chapter of the *Horizon Basics Guide*.)

Starting a Horizon Process Using a Keyboard

When you use the keyboard to start a process, you press a certain sequence of keys. You must know the keystrokes that open the function that you want. If your navigation bar is open and is set up to display shortcuts, you can see the keystrokes listed there. (However, the navigation bar does not have to be open for you to use the shortcuts.) The drop-down menus on the menu bar also display several keyboard shortcuts.

Your security settings may give you the rights to edit or create a shortcut. (For more information, see the *Launcher Configuration Guide*.)

You can use the keyboard in these ways:

- **Lead-in keys.** A lead-in key focuses the cursor on a certain set of tasks from which you can choose. The F9 key focuses the cursor on the navigation bar, so that your next keystroke moves you through the folders of the navigation bar to find the process that you want to start. (You can use arrow keys, the first letter of the process that you want, or choose Find from the Edit menu to move to the process.)
- **Predefined keyboard shortcuts.** Windows and Horizon have certain default shortcuts that can help you in your work. You cannot change these shortcuts. (For example, F2 starts a New Search.) (For a list of the most common predefined keyboard shortcuts, see "Shortcut Keys" in the "Horizon User Interface" chapter of the *Horizon Basics Guide*.)
- **User-defined keyboard shortcuts.** You can create shortcuts that start Horizon processes when you customize the Launcher. (For more information, see the *Launcher Configuration Guide*.)

- **Press ALT+W.** This activates the Window drop-down menu. Then type the number of the open window or record that you want to make active.

> **NOTE**
>
> Pressing **ALT** plus any underlined letter in the menu bar activates the drop-down menu for that menu option.

- **Press CTRL+F6.** This cycles through the open windows.

Customizing the Launcher

Depending on your security settings, you can customize your Launcher. (For instructions, see the *Launcher Configuration Guide*.) In general, you or your system administrator can customize the Launcher in these ways:

- **Toolbars.** You can create a new toolbar or modify an existing toolbar's appearance and design so that the toolbar shows only the processes you use frequently.
- **Navigation bar.** You can hide or add new folders, processes, and applications to the navigation bar, including third party products. You can also set up shortcuts for processes and applications on the navigation bar.
- **Diacritics.** You can add, delete, and edit the non-keyboard characters (such as the British pound or an accent mark) that are available on the Diacritic Shortcut Bar. You can also specify the shortcuts for each character.
- **Background.** You can choose what background displays in the Launcher workspace.
- **Startup.** You can choose the processes that start automatically, and which folders on the navigation bar open automatically, when you first log in to Horizon.

> **NOTE**
>
> Unless your security settings let you save changes that you make in the Launcher environment, the Launcher may revert to its default appearance when you log off.

Inventory Basics

The Inventory process gives your library a way to account for your holdings by collection. Inventory helps you maintain organized and complete collections by identifying misshelved or missing items. You need to determine the best plan for your inventory activity based on the size and number of your collections, the size of your library, and the number of people who will be involved in the inventory process.

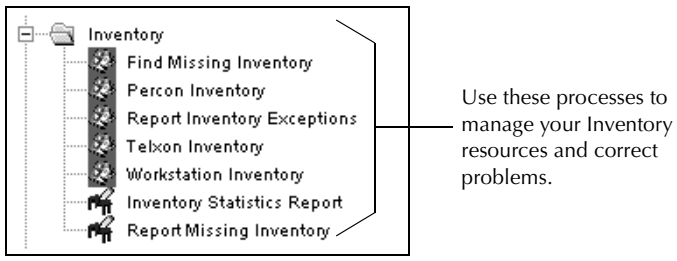
This section explains these topics:

- Inventory Processes
- Overview of Tasks

Inventory Processes

When you first install Horizon, the Inventory folder on the navigation bar contains these folders and processes:

Figure 1.2: Inventory Processes



You may see only some of these Inventory processes on your navigation bar. Your security setup and Launcher configuration determine what processes are available on your navigation bar, and where they display. (For more information, see your system administrator or the *Launcher Configuration Guide*.)

Overview of Tasks

As you work in Inventory, you will do these basic tasks:

- **Planning inventory.** Before you actually start counting your library's items, plan how you will take inventory. If you plan well, your inventory taking will be more efficient. (For more information, see "Planning Inventory" on page 2-3.)
- **Setting up for inventory.** The system administrator must set up or update the collection code and item status tables so Horizon will record when your staff takes inventory for a particular collection. The system administrator must also set up the tables to establish if and how the system reports exceptions found during the inventory for a particular collection. If you use hand-held computers for your inventory, your system administrator must also set up those units. (For more information, see "About Inventory Setup" on page 3-3.)

- **Taking inventory.** When you take inventory, you record the barcodes of a particular collection and upload them into the Horizon server for processing. (You can record barcodes by scanning them with a hand-held computer or by typing or scanning them into a workstation.) Horizon tracks these items so you account for everything including those items that the inventory process has found to be in the wrong place or missing. Once you determine which items are in the wrong place or missing, you can resolve those issues. (For more information, see "About Taking Inventory" on page 4-3.)
- **Resolving inventory issues.** After you take inventory, you must report and manage exceptions found during inventory. This includes tasks such as printing an Inventory Exceptions report, resolving exceptions, finding missing inventory, creating and printing missing inventory reports, and resolving missing inventory. (For more information, see "About Resolving Inventory Issues" on page 5-3.)

Chapter 2

Planning Inventory

This chapter explains how to plan inventory and gives suggestions for events and activities you should consider. This section compares workstations and hand-held computers to help you decide which equipment to use for each section of your library during inventory.

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Planning Inventory

You may want to create an plan before you take inventory. This plan can help you to inventory your collections completely and efficiently.

You may want to follow these suggestions to develop an effective inventory plan:

- Create a schedule showing the order in which you will inventory your collection. Remember to include your smaller collections, special collections, and non circulating items.

  While planning your schedule, you may want to see how long you took for a previous inventory on the same collection.
- Decide which types of items will be listed as exceptions and how you will resolve those exceptions. (For example, some items your library might want to track as exception items would be misshelved items, items found but not cataloged, duplicate items, items marked for interlibrary loan that should have been shipped, and so forth.)
- Divide your large collections into manageable groups up to about 10,000 items. That way, you can resolve each group's exception items immediately, instead of waiting until the entire collection has been inventoried.

  NOTE

  To divide your larger collections into smaller groups, you might want to inventory items on a certain number of shelves or a certain range of call numbers, or use any other type of range that fits the way you do inventory in your library.
- Choose a method for collecting barcodes. You can use workstations, hand-held computers, or a combination of these.
- Leave enough time after entering each group of barcodes to print the Inventory Exceptions report and resolve any problems you find. The sooner you resolve the problems, the more likely that the items will still be on the shelves. You should resolve all the problems for one collection before starting inventory for another collection.
- Because inventory involves many people, you might want to develop a method to monitor your inventory progress. (For example, you can create a chart that shows a group of call numbers and what has been completed for each section, such as the reports that have already been run.)

Planning Which Devices to Use

You can use workstations and hand-held computers to take inventory. You can choose either one for a particular task in the inventory process, based on its advantage in that setting. If you use the hand-held computer, you will also use the workstation to upload the barcodes from the hand-held computer and then transfer the information to the Horizon Inventory database.

To take inventory, you enter the barcode information by using one or more of the devices in this table:

Device	Description
Telxon Portable Transaction Computer (PTC)	A portable, hand-held computer, referred to in this document as Telxon unit. (For more information about using the Telxon unit, see "Entering Barcodes with a Telxon Unit" on page 4-11. See also the *Telxon Manual*.)
Percon Portable Data Terminal (PT 2000)	A portable, hand-held computer, referred to in this document as Percon unit. (For more information about using the Percon unit, see "Taking Inventory with a Hand-held Computer" on page 4-10. See also the *Percon PT 2000 & TopGun Portable Data Terminals User's Guide*.)
Percon TopGun	A laser module mounted on a Percon unit. TopGun can scan barcodes on flat, curved, or irregular surfaces at distances ranging from one inch to two feet. (For more information about using the TopGun, see "Taking Inventory with a Hand-held Computer" on page 4-10. See also the *Percon PT 2000 & TopGun Portable Data Terminals User's Guide*.)
Barcode wand or other barcode reader	A wand or reader attached to a workstation. Lets you enter barcodes directly into the Horizon database. (For more information, see "Taking Inventory at a Workstation" on page 4-6.)
Workstation	A keyboard is attached to a workstation. Lets you enter barcodes directly into the Horizon database. (For more information, see "Taking Inventory at a Workstation" on page 4-6.)

Workstations and hand-held computers have different advantages depending on the way your library is laid out and the way you plan to take inventory.

This table compares workstation and hand-held computer inventory methods:

Workstations let you	**Hand-held computers let you**
• Wheel the terminal past the shelves or bring books to the terminal. (You might want to use this method if your library is small or only one person is taking inventory.) • Enter as many barcodes as you want in a session. • See exception messages immediately. (For example, if you enter the barcode of an item that belongs to another collection, a message tells you to which collection it belongs. You can immediately reshelve the item instead of waiting until the item appears on the Exceptions report.)	• Walk past the shelves carrying the hand-held computer. (You might want to do this if your library is large or several people are taking inventory at once.) • Enter as many barcodes as the hand-held computer's memory can hold. • Collect barcodes without being interrupted by exception messages. (You can still resolve problems when you print the Exceptions report.) • Upload the barcodes from the hand-held computer to a Horizon workstation. • Save money because a hand-held computer is less expensive than a workstation.

Chapter 3

Inventory Setup

This chapter explains how the system administrator sets up Horizon Inventory tables to tally the inventory inputs and track exceptions. It also explains how to set up hand-held computers. Before library staff can take inventory, the system administrator must set up Inventory tables and defaults in Horizon.

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Choosing Whether to Report Items as Misshelved 3-6

Creating or Editing Collection Inventory 3-7

Setting Up a Hand-held Computer for Inventory 3-10

About Inventory Setup

Your library's cataloging staff marks incoming items with barcodes and call numbers that indicate information such as where the item belongs, title, author, publication date, and other such facts. (For more information about cataloging, see the *Cataloging Guide*.)

NOTE

This chapter assumes that you know how to use the Table Editor. (For more information, see "Horizon Table Editor" in the "Getting Started" chapter of the *System Administration Guide*.)

Whenever you make a change to Horizon setup, you should exit Horizon and restart it on any workstation where you want the change to take effect.

When you enter the items' barcodes and call numbers marked on the items into the Horizon database, they become part of the record you use for tracking those items. Your system administrator must set up tables in the database to help track and report where the items should be and where they are. If you use hand-held computers for your inventory, your system administrator must also set up those units.

NOTE

Have your system administrator set up the correct passkeys and roles in Horizon security before you continue. (For more information about roles and passkeys, see "Securing Horizon" in the "Security and Preferences" chapter of the *System Administration Guide*.)

Before you take inventory, your system administrator must set up parameters in these tables:

- **Item status.** When the system administrator sets the parameters in the item status, Horizon uses those parameters to determine whether or not to report an item with a particular status as an exception.
- **Collection.** Lets you group related items.
- **Collection inventory.** Lets you assign the location and call number type for an inventory. A call number is a set of characters that describes such things as the location for an item and type of information in that item. Call number type refers to a system used to identify and track items in a library (for example, the Library of Congress or Dewey Decimal System). Collection Inventory is linked to the Collection table.

IMPORTANT

Make sure any exceptions from previous inventories have been cleared before starting inventory. (For more information about how to do this, see "Running the Inventory Exceptions Report" on page 5-3.)

This chapter explains these tasks:

- Choosing Whether to Report Items as Exceptions
- Choosing Whether to Report Items as Misshelved
- Creating or Editing Collection Inventory
- Setting Up a Hand-held Computer for Inventory

Choosing Whether to Report Items as Exceptions

When you set up an item status, you determine which status will make Horizon report an item as an exception on the Inventory Exceptions report. (For instructions on setting up an item status, see "Working with Item Statuses" in the *Circulation Setup Guide*.)

This table describes the exceptions that Horizon can report during your inventory:

Exception	Description
Item not found	No item exists with this barcode.
Incorrect location	The item belongs in a different location.
Incorrect collection	The item belongs in a different collection.
Incorrect call type	The item call number type is different from the call number type specified for the inventory.
Call number missing	The item does not have a call number.
Invalid item status	Item status is not "Checked In" (i) or "Shelving Cart" (s).
Item misshelved	The item is misshelved or the item you just recorded is misshelved.
Previous item	The previous item on the shelf in relation to an item with an exception.
Next item	The next item on the shelf in relation to an item with an exception.

NOTE

Other than Previous item and Next item, this table shows the hierarchy of exceptions as Horizon reports them. (For example, if an item has an incorrect location and is misshelved, Horizon would report only the incorrect location, because Horizon checks for location before checking for the misshelved exception.)

To choose whether to report items as exceptions

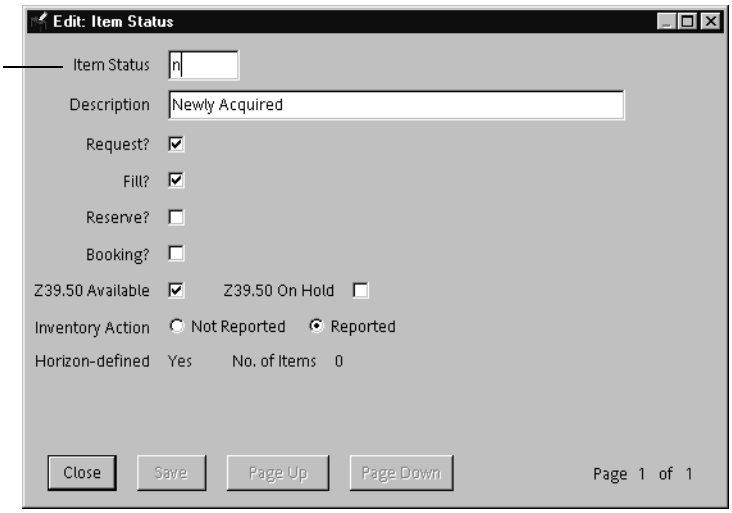
1. Open the **item_status** view in the Table Editor.

   Horizon displays the List Item Status window.

2. Choose the item status that you want to edit.

   Horizon displays the Edit Item Status window:

The Item status defaults to report the exception (Reported) on all item statuses except "i" (Checked In) or "s" (Shelving Cart).



   (For a complete description of all the fields and options on this window, see "Working with Item Statuses" section in the *Circulation Setup Guide*.)

3. Do one of these options at the **Inventory Action** field:

   - If you want to report an exception based on this item status, choose **Reported**.
   - If you do *not* want to report an exception based on this item status, choose **Not Reported**.

4. Save your changes.

Choosing Whether to Report Items as Misshelved

A collection lets you group related items to help you organize your inventory. While taking inventory, you may not want to have Horizon track misshelved items. This section explains how to set a collection not to report misshelved items.

NOTE

By default, all collections are set up to report misshelved items. Your library should review the collection codes before inventory to determine whether you want to keep the default setting or change it.

(For instructions on setting up a collection, see "Setting Up or Updating a Collection" in the "General Setup" chapter of the *System Administration Guide*.)

To choose whether to report items as misshelved

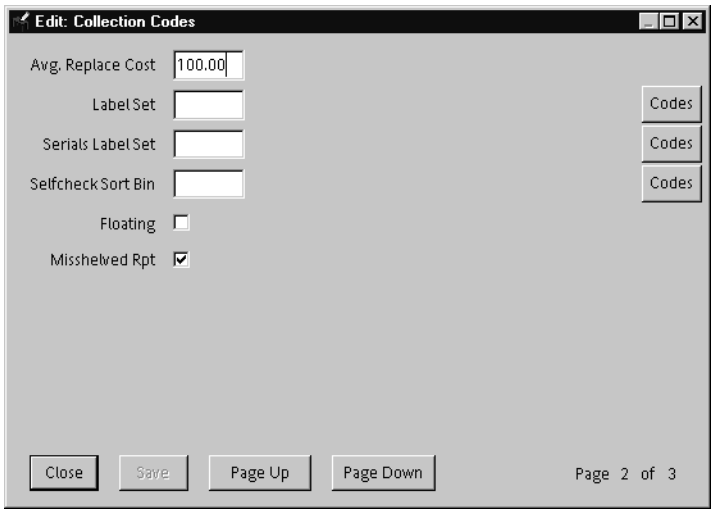
1. Open the **collection** view in the Table Editor.

   Horizon displays the List Collection Codes window.

2. Choose the collection you want to edit.

   Horizon displays the Edit Collection Codes window.

3. Click **Page Down** or resize the window to display the **Misshelved Rpt** box:



(For a complete description of all the fields and options on this window, see "Setting Up or Updating a Collection" in the "General Setup" chapter of the *System Administration Guide*.)

4 Do one of these options:

- If you want items in this collection reported as misshelved on the Inventory Exceptions report, mark the **Misshelved Rpt** box.
- If you do *not* want items in this collection reported as misshelved on the Inventory Exceptions report, unmark the **Misshelved Rpt** box.

  (For example, you would not track misshelved items while you take inventory of items on a shelving cart.)

5 Save your changes.

Creating or Editing Collection Inventory

Before you can take inventory, you must assign the location and call number type to the inventory. You can do this by creating or updating existing collection information in the Collection Inventory group, which is a section in the Collection Codes window.

The collection table tracks the cumulative number of inventories, misshelved items, and invalid items for this collection.

NOTE

When Horizon marks an inventory complete and you start a new inventory, Horizon adds the current totals to the cumulative totals and then sets the current totals to zero. The cumulative total fields are editable in case you want to manually set the count back to zero.

To create or edit Collection Inventory

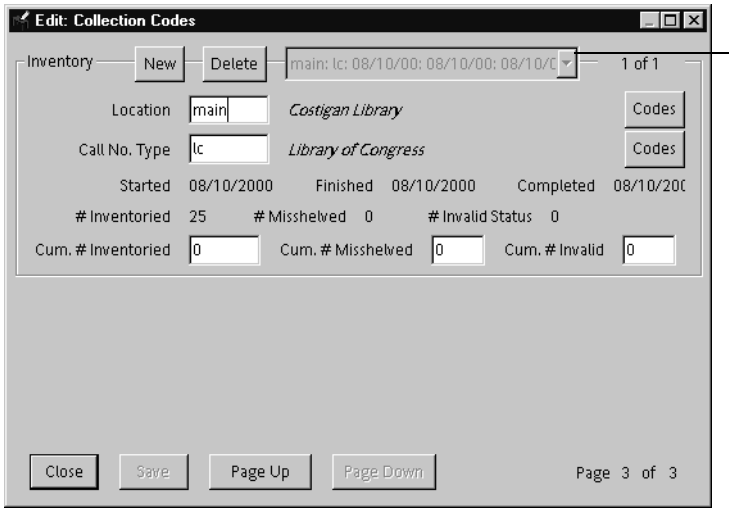
1 Open the **collection** view in the Table Editor.

Horizon displays the List Collection Codes window.

2 Choose the collection you want to edit.

Horizon displays the Edit Collection Codes window.

3 Click **Page Down** or resize the window to display the **Inventory** group:



Click here to choose fror the drop-down menu.

> **NOTE**
>
> If the cumulative totals or counts in this window exist in the # Inventoried, # Misshelved, and # Invalid Status fields, these totals reflect all previous inventories only at the start of a new inventory.

4 Do one of these options:

- If you want to create a new collection inventory record, click **New**.
- If you want to edit an existing collection inventory record, choose a record from the drop-down list.

> **NOTE**
>
> You can delete an existing collection inventory record only before Horizon records a start date for that inventory record.

5 Complete or update these fields in the **Inventory** group:

In this field	Do this
Location	Enter or choose the location code for the collection. For a collection that is common to two or more locations (for example, science fiction), you might want to take inventory as if the one collection were two or more collections, based on location, so you could resolve issues in one location at a time. (The Location field defaults to the location you specified during login.)
Call No. Type	Enter or choose the call number type code for this inventory group. When you enter the call number type, that will become the default for the collection.
Cum. # Inventoried	This field shows the cumulative number of inventoried items for the location, collection, and call number type. If your library does not want to track grand totals of inventoried items from previous years, enter “0” (zero).

In this field	Do this
Cum. # Misshelved	This field shows the cumulative number of misshelved items for the location, collection, and call number type. If your library does not want to track grand totals of misshelved items from previous years, enter "0" (zero).
Cum. # Invalid	This field shows the cumulative number of invalid items for the location, collection, and call number type. If your library does not want to track grand totals of invalid items from previous years, enter "0" (zero).

You might want to note the other display fields in this window. This table describes the inventory display fields on the Collection Codes window:

Field	Descriptions
Started (date)	This field displays the date of the first entry for this inventory.
Finished (date)	This field displays the date of the last entry for this inventory.
Completed (date)	After you finish an inventory and then run Find Missing Inventory, this field displays the date you finished the inventory. (For more information, see "Finding Missing Inventory" on page 5-6.)
# Inventoried	This field displays the total number of items you have recorded during this inventory. This field shows the counts of an on-going inventory or the most recently completed inventory.
# Misshelved	This field displays the total number of misshelved items discovered during this inventory. This field shows the counts of an on-going inventory or the most recently completed inventory.
# Invalid Status	This field displays the total number of items with an invalid status discovered during this inventory. This field shows the counts of an on-going inventory or the most recently completed inventory.

6 Save your changes.

Setting Up a Hand-held Computer for Inventory

If your library uses a hand-held computer to take inventory, you must use a computer that was pre-programmed by Dynix and you must have a way to transfer the barcodes from the computer to the Horizon server. The hand-held computer must have the proper chip in it with the proper settings for inventory and the inventory transfer software must be in the workstation. This section describes how to set up the Telxon and Percon hand-held computers for inventory and how to set up a Horizon workstation to receive and transfer inventory information to the Horizon server.

This table shows the steps to set up each of these computers:

If you have a Telxon unit, do this	**If you have a Percon unit, do this**
1 Make sure the Telxon unit has a chip with inventory software. 2 Set up the Telxon unit for inventory. (For instructions, see the *Telxon Manual*.) 3 Install the Telxon transfer software to the workstation and create an icon for the executable file on the Windows desktop. The executable file name for Telxon is "telxon download for the PC.exe." 4 Make sure that the Telxon Inventory process is in the Inventory folder in the Horizon navigation bar. If the Telxon process is not in the Inventory folder, your system administrator can give you access to Inventory. (For more information, see the *Launcher Configuration Guide* or the *System Administration Guide*.)	1 Make sure thePercon unit has a chip with inventory software. 2 Set up the Percon unit for inventory. If your Percon unit includes a TopGun, set up the TopGun, too. (For instructions, see the *Percon PT 2000 & TopGun Portable Data Terminals User's Guide*.) 3 Install the Percon transfer software to the workstation and create an icon for the executable file on the Windows desktop. The executable file name for Percon is "ptfer.exe." 4 Make sure that the Percon Inventory process is in the Inventory folder in the Horizon navigation bar. If the Percon process is not in the Inventory folder, your system administrator can give you access to Inventory. (For more information, see the *Launcher Configuration Guide* or the *System Administration Guide*.)

Chapter 4

Taking Inventory

This chapter explains how to take inventory by scanning barcodes or by manually entering barcode numbers into Horizon Inventory. You can collect the barcode information either by using a workstation or hand-held computer or a combination of both. You can then use the barcode information to manage your library's inventory issues.

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Uploading Data from a Hand-held Computer to Your Horizon Workstation 4-15

Processing Inventory Data Uploaded from a Hand-held Computer 4-18

About Taking Inventory

After your system administrator sets up Horizon, the workstation, and any hand-held computers you use, you can start taking inventory. When you take inventory, Horizon checks the holdings in your collections to determine whether items are missing, misshelved, lost, and so forth.

You can use Item Group Editor before starting your inventory to change items to a different, temporary collection code. (For more information on changing groups of items, see "Using Item Group Editor" in "Appendix A" of the *Circulation Guide*.)

IMPORTANT

Taking inventory on a collection might take hours, days, or weeks, depending on the size of the collection and the number of problem items you find.

This chapter explains these topics:

- Taking Inventory on Shelving Cart Items
- Taking Inventory at a Workstation
- Taking Inventory with a Hand-held Computer
- Uploading Data from a Hand-held Computer to Your Horizon Workstation
- Processing Uploaded Inventory Data in Horizon

Taking Inventory on Shelving Cart Items

When you take inventory on a collection, whether you use a workstation or hand-held computer, you should first take inventory on the items in that collection that are on the shelving cart. If you do, Horizon counts these items in your inventory even if you finish taking inventory on the entire collection before you have reshelved the items.

You do not need to take inventory on items that are checked in and placed on the shelving cart after you start the inventory process. The system tracks these items and makes sure they are not considered missing.

To take inventory on shelving cart items

1 If you have not already done so, choose not to track misshelved items on the Inventory Exceptions report.

To do this, unmark the **Misshelved Rpt** box on the Edit Collection Codes window. Your system administrator might have to do this for you if you are not authorized to access the Horizon Table Editor. (For instructions, see "Choosing Whether to Report Items as Misshelved" on page 3-6.)

IMPORTANT

If you do not unmark Misshelved Rpt, all the items you inventory from the shelving cart will appear on the Inventory Exceptions report as misshelved items.

2 Do one of these options:

- If you use a workstation to count the shelving cart items, activate the **Workstation Inventory** process and enter the barcodes from the shelving cart items on your keyboard or scan the barcodes using your wand reader.

  The default location of this process is the **Inventory** folder on the navigation bar.

  (For more information about how to start taking inventory, see "Taking Inventory at a Workstation" on page 4-6.)

- If you use hand-held computers to take inventory, scan the barcodes with your hand-held computer and upload the barcode file to the workstation.

  (For more information, see "Taking Inventory with a Hand-held Computer" on page 4-10.)

3 If you do *not* want to track misshelved items for the rest of the collection, skip to step 4; otherwise, do the steps in this table:

1	Click **Complete** to finish the inventory of the shelving cart items.
2	Note the session ID number.
3	Click **OK** to return to the Profile Inventory window.
4	Exit Workstation Inventory.
5	Choose to track misshelved items on the Inventory Exceptions report. To do this, mark the **Misshelved Rpt** box on the Edit Collection Codes window. (For more information, see "Choosing Whether to Report Items as Misshelved" on page 3-6.) Misshelved items for the rest of the collection will appear on the Inventory Exceptions report.
6	Take inventory on the rest of the collection. (For instructions, see "Taking Inventory at a Workstation" on page 4-6.)

4 When you finish taking inventory, click **Complete**.

Horizon displays the Exceptions Message window:

5 When the session ID number displays, make note of it in case you need to print the Inventory Exceptions report just for that session.

6 Click **OK**.

7 Click **Cancel** in the Profile Workstation Inventory window.

Taking Inventory at a Workstation

You can take inventory from any workstation that has access to the Horizon database. Horizon tallies items by collection. Input from a barcode reader or a keyboard goes directly to the Horizon Inventory database.

When you take inventory on a workstation, Horizon sets the Start date to the date when you enter the first barcode for a collection. Horizon sets the Finish date to the date when you enter the last barcode for the same collection. If an inventory takes two days, the Start and Finish dates are the same on day one, but when you resume inventory the next day, Horizon updates the Finish date to that day's date.

Taking inventory at a workstation offers several advantages. You can:

- Wheel the terminal past the shelves or bring books to the terminal.
- Enter as many barcodes as you want in a session.
- Take immediate note of the exception messages.

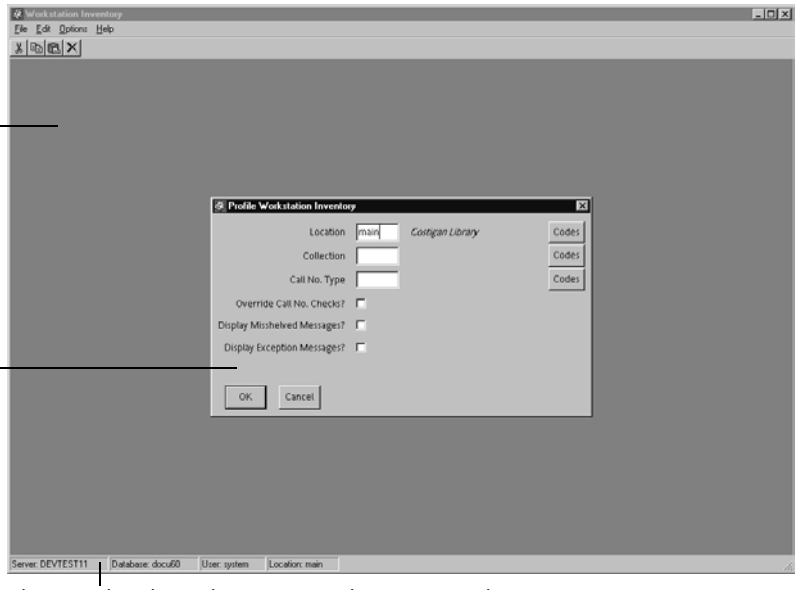
  (For example, if you enter the barcode of an item that triggers an exception message, the message tells you whether the item has a different collection, location, call number type, or item status. You can immediately reshelve the item instead of waiting until the item appears on the Inventory Exceptions report.)

To take inventory at a workstation

1 Start the **Workstation Inventory** process.

  The default location of this process is the **Inventory** folder on the navigation bar.

  Horizon opens the Workstation Inventory window, then displays the Profile Workstation window:



Workstation Inventory window

Profile Workstation Inventory window

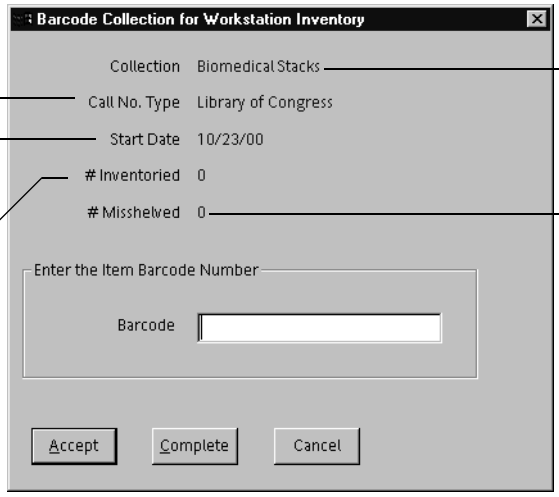
The status bar shows the Server, Database, User, and Location. You can show or hide the status bar by closing the Profile Workstation Inventory window and choosing **Options, Show Statusbar**.

2 Complete or update these fields in the Profile Workstation Inventory window:

In this field	Do this
Location	Enter the location of the collection for which you want to take inventory. For a list of valid locations, click **Codes**. (The Location field defaults to the location specified during login.)
Collection	Enter the name of the collection. For a list of valid collection names, click **Codes**.
Call No. Type	Horizon sets the Call No. Type from the collection name. If you want to, enter an alternate call number type if your library has set the Call Type field in the item record to override the default call number type set in the collection record. (For more information on setting the default, see "About Inventory Setup" on page 3-3.)
Override Call No. Checks?	If you do *not* want Horizon to report exceptions for missing call numbers, incorrect call number types, and misshelved items, then mark this box; otherwise, leave this box blank.
Display misshelved messages?	If you want Horizon to display a message when it encounters a misshelved item during the inventory process, mark this box; otherwise, leave this box blank. NOTE If you choose to display misshelved messages, then when Horizon encounters a misshelved item, the system displays a message describing the problem.
Display exception messages?	If you want Horizon to display these messages during the inventory process, mark this box; otherwise, leave this box blank. NOTE If you choose to display exception messages, then when Horizon encounters an exception, the system displays a message describing the problem.

3 Click **OK**.

Horizon displays the Barcode Collection for Workstation Inventory window:



This field displays the call number type for this inventory session.

The Start Date shows the date this inventory session began. For a new inventory session, the Start Date defaults to the current date.

Horizon tracks and displays the number of items inventoried in the # Inventoried field.

This field displays the collection for this inventory session.

If you set a collection to track misshelved items, then Horizon records the number of misshelved items in the # Misshelved field and writes the information to the exceptions table.

4 At the **Barcode** field, scan or enter the barcode for each item in the collection.

5 If your reader does not record a carriage return when you scan barcodes or if you enter the barcode information on the keyboard, do one of these options:

- Click **Accept** and press **ENTER**.
- Press **ALT+A** at the end of each barcode to add it to the database.

6 Do one of these options:

- Resolve exceptions immediately (recommended).

  (For example, if you find a misshelved item, reshelve it in its correct place.)

  NOTE

  Resolving an exception immediately does not remove that exception from the report. (For instructions, see "About Resolving Inventory Issues" on page 5-3.)

- Wait and print the Inventory Exceptions report after the inventory session or after the entire inventory process for your library is complete, then resolve the exceptions on the report.

  (For more information, see "Running the Inventory Exceptions Report" on page 5-3.)

7 When you finish taking inventory for this collection, click **Complete** or press **ALT+C**.

Horizon displays the ID number for the session:

> **NOTE**
>
> If Horizon encounters an exception and writes it to the exception table, Horizon assigns a session ID number to that inventory session. If several people perform inventory on different ranges of the same collection at the same time, the session ID number helps your library staff focus on printing and resolving the exceptions that occur in their ranges. (For more information on printing and resolving inventory exceptions, see "About Resolving Inventory Issues" on page 5-3.)

8 Make a note of the session ID number in case you need to print the Inventory Exceptions report just for this session.

9 Click **OK**.

Taking Inventory with a Hand-held Computer

You can take inventory with a hand-held computer that reads barcodes, stores inventory information, and uploads the information to the Horizon database through a workstation. Two such devices are the Telxon Portable Transaction Computer (PTC) and the Percon Portable Data Terminal (PT 2000). (For more information on how to operate the Telxon unit, see the *Telxon Manual*. For more information on how to operate the Percon unit, see the *Percon PT 2000 & TopGun Portable Data Terminals User's Guide*.)

After you take inventory with either of these units, you can upload the barcode information to a file on a Horizon workstation. Use either the Telxon Inventory process or the Percon Inventory process to upload and process the barcodes within Horizon. This information adds to any other inventory information you might have entered for a given collection, location, and call number type directly from a workstation or from other hand-held computers to make accurate totals of inventory.

In a hand-held computer inventory, the computer sets the Start and Finish dates using the internal date when the first batch of barcodes are uploaded. As subsequent batches are uploaded, Horizon adjusts the Start and Finish dates according to the incoming internal hand-held computer dates. The Start date for the batch will ultimately be the earliest date linked to a given batch. The Finish date will be the last internal date from any uploaded barcodes for that batch.

This section explains these topics:

- Preparing to Use a Hand-held Computer
- Entering Barcodes with a Telxon Unit
- Entering Barcodes with a Percon Unit

Preparing to Use a Hand-held Computer

If you use hand-held computers for some or all of your inventory, consider these suggestions:

- Fully charge the batteries for the hand-held computers before taking inventory. If possible, have extra batteries available. If the extra batteries you have are rechargeable, charge those batteries before taking inventory.
- Allow extra time for uploading barcodes to the workstation. Uploading barcodes takes about 15 to 20 minutes for every 500 barcodes. (Your results may vary.)
- If possible, use multiple hand-held computers. While one hand-held computer is uploading barcodes, you can enter barcodes with another.

IMPORTANT

Plan enough time after your inventory session to print the Exceptions report. Resolve the problems for this group or collection on the same day that you enter the barcodes so you will be more likely to find the items on the shelves.

Entering Barcodes with a Telxon Unit

When you enter barcodes on a Telxon unit, you can collect up to 800 barcodes (500 is recommended for best results). When you finish entering barcodes, you must transfer the barcodes from the Telxon unit to the workstation for processing. Upload the barcodes as soon as possible so exceptions can be handled while the items can still be found.

NOTE

You must have at least a 2.6 version chip in the Telxon unit to use your Telxon unit for inventory.

To enter barcodes with a Telxon unit

1. Press the **ON/OFF** button once to turn on the Telxon unit.
2. Go to the Telxon Main Menu.

   (For instructions, see the *Telxon Manual*.)
3. If necessary, do one of these options:
   - If the Telxon unit shows that you are in Portable Circulation or Inventory, hold down **EXIT** until the Telxon unit beeps three times.

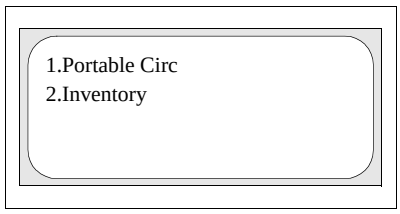
     IMPORTANT

     The alternate step below tells you to reset your Telxon unit. When you reset it, the data in the computer might be lost, so make sure you no longer need any barcodes that are still in memory before you reset the Telxon unit.

   - If the Telxon unit has not been used before, or if you want to verify that you have the current version of the Telxon unit Operating System, reset the Telxon unit.

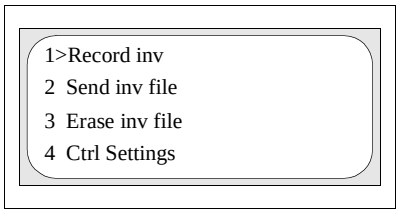
     (For instructions, see the *Telxon Manual*.)

   The Telxon unit momentarily displays the operating system and then displays the Telxon Main Menu:



4 Press **2** to choose **Inventory**.

The Telxon unit displays the inventory menu:



5 To record inventory, press **1**, or press an arrow key to choose **Record inv** and then press **ENTER**.

The Telxon unit displays the current date and time and asks if they are correct.

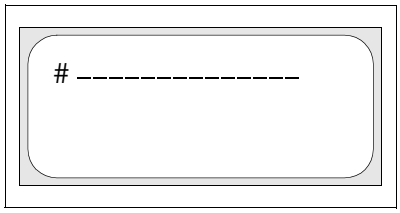
6 Do one of these options:

- If the displayed date and time are correct, press **YES**.
- If the displayed date or time is incorrect, press **NO**. Then enter the correct date and time. The system displays the date and time you just entered and asks if they are correct. Press **YES**.

The Telxon unit displays how many barcodes you can enter before the memory is full.

7 Press **ENTER**.

A barcode prompt displays:



8 Scan the barcode for the first item you want to count in the inventory.

NOTE

After you scan each barcode, the Telxon unit displays the barcode prompt with the previous barcode underneath.

9 Continue scanning barcodes until you have scanned all the barcodes you want.

IMPORTANT

Plan enough time after your inventory session to print the Exceptions report. Resolve the problems for this group or collection on the same day that you enter the barcodes so you will be more likely to find the items on the shelves.

10 Press **EXIT** when you finish entering barcodes.

The Telxon unit displays the Inventory menu again.

11 Do one of these options:

- If you want to continue with the inventory later, turn off the Telxon unit, or leave the unit alone and it will turn itself off in about two minutes.
- If you want to upload the barcodes to the workstation, see "Uploading Data from a Telxon Unit" on page 4-15.

Entering Barcodes with a Percon Unit

When you enter barcodes on a Percon unit, you can collect up to 5,000, but for safety, Dynix recommends that you collect only 500 before uploading. When you finish entering barcodes, you must transfer the barcodes from the Percon unit to the workstation for processing.

Before You Begin

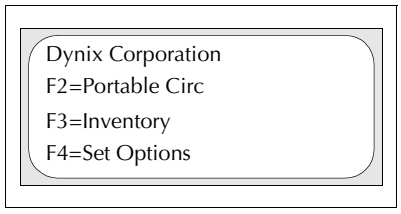
Before you take inventory with the Percon unit, reset it to make sure it does not have barcodes in memory from a previous inventory session.

(For more information on resetting the Percon unit, see the *Percon PT 2000 & TopGun Portable Data Terminals User's Guide*.)

To enter barcodes with a Percon unit

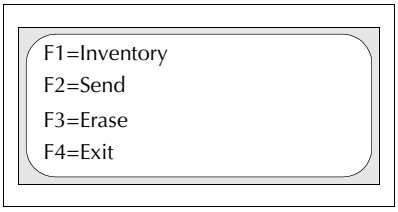
1 Press the **1/0** button to turn on the Percon unit.

The Percon unit displays the Main Menu:



2 Press **F3** to choose Inventory from the Main Menu.

The Percon unit displays the Inventory menu:

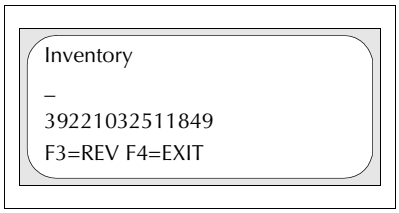


3 Press **F1** from the Inventory menu to start Inventory.

4 Scan the barcodes with the wand or Percon TopGun.

(For more information on scanning barcodes, see the *Percon PT 2000 & TopGun Portable Data Terminals User's Guide*.)

After you scan each barcode, the Percon unit displays the barcode number and leaves a blank line for the next barcode:



5 Continue to scan barcodes until you have as many as you want for the session.

IMPORTANT

Plan enough time after your inventory session to print the Exceptions report. Resolve the problems for this group or collection on the same day that you enter the barcodes so you will be more likely to find the items on the shelves.

6 When you have entered all the barcodes you want for this session, press **F4** twice to return to the Main Menu.

7 Do one of these options:

- If you want to continue with inventory later, press the **1/0** button to turn off the Percon unit, or leave the unit alone and the Percon Auto-Off feature will turn off the Percon unit in about 10 minutes.

  (For instructions on changing the Auto-Off settings, see the *Percon PT 2000 & TopGun Portable Data Terminals User's Guide*.)

- If you want to upload the barcodes to the workstation, see "Uploading Data from a Percon Unit" on page 4-17.

Uploading Data from a Hand-held Computer to Your Horizon Workstation

After you finish entering the barcodes into your hand-held computer, you upload the data to your Horizon workstation. After you upload the barcodes to the workstation, you use the Horizon Telxon or Percon function to process the data. (For more information, see "Processing Uploaded Inventory Data in Horizon" on page 4-18.)

This section explains these topics:

- Uploading Data from a Telxon Unit
- Uploading Data from a Percon Unit

Uploading Data from a Telxon Unit

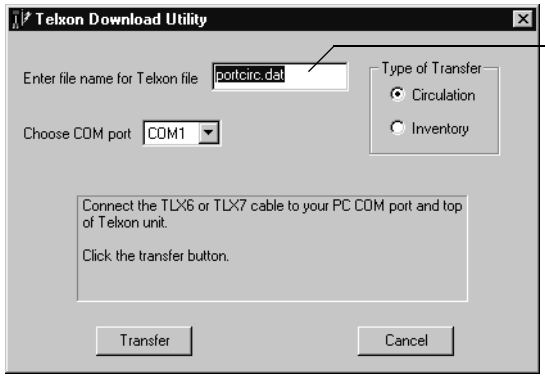
After you take inventory on the Telxon unit, you can upload the inventory data to your Horizon workstation.

To upload data from a Telxon unit

1. Connect the Telxon unit to the COM port (usually COM1) on the back of the workstation by using a TLX-6 cable (if your COM port is 9-pin) or a TLX-7 cable (if your COM port is 25-pin).
2. On your workstation, start the Telxon Download Utility.

   To do this, double-click the icon that the system administrator created for the utility while setting up the Telxon unit for inventory. (For more information on where to find the icon, see your system administrator.)

   Horizon displays the Telxon Download Utility window:



The default name is highlighted. If you start to type a different name for the file, the Telxon program deletes the default name and replaces it with the file name you enter.

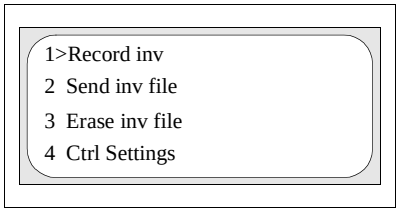
3. If necessary, enter a new file name in the **Enter file name for Telxon file** field.

   (For example, you might want to include numbers or other characters so you can distinguish this file from other files you create.)
4. Choose **COM1** or **COM2** in the **Choose COM port** field to match the COM port you connected with the Telxon unit.
5. Click the **Inventory** button in the **Type of Transfer** group.
6. Click **Transfer**.

7 Follow the prompts in the Telxon Transfer Utility window.

8 If the Telxon unit is not already at the Inventory menu, press **EXIT** once or twice.

The Telxon unit displays the inventory menu:



9 To transfer inventory, press **2**, or press an arrow key to select **Send inv file** and then press **ENTER**.

The Telxon unit prompts you to "Connect TELXON to A/B switch." (You have actually connected it directly to the workstation instead.)

10 On the Telxon unit, press **ENTER** three times to bypass the "Connect TELXON to A/B switch" message, to bypass the "Be sure DYNIX is ready" message, and to confirm that you are ready to send the data.

NOTE

Your Telxon unit shows "Be sure DYNIX is ready," but that does not affect the way that the Telxon unit operates and interacts with the Horizon system. If your Telxon unit does not show this message, contact Dynix Customer Support (the unit might not have been pre-programmed at Dynix).

The Telxon unit uploads the data to the "telxon" directory on the workstation.

11 When the Telxon unit shows the transfer is complete, press **ENTER** to finish.

NOTE

You might want to process the barcodes in Horizon before you delete the barcode file from your Telxon unit to make sure you do not need the file anymore. (For more information, see "Processing Uploaded Inventory Data in Horizon" on page 4-18.)

Uploading Data from a Percon Unit

After you take inventory on the Percon unit, you can upload the inventory data to your Horizon workstation.

Your system administrator must install the Percon Portable File Transfer software to the workstation before you can upload the information from your Percon unit to the workstation. (For more information about installing the software, see "Setting Up a Hand-held Computer for Inventory" on page 3-10.)

After you upload the information to the workstation, you can process the information on your Horizon server.

To upload data from a Percon unit

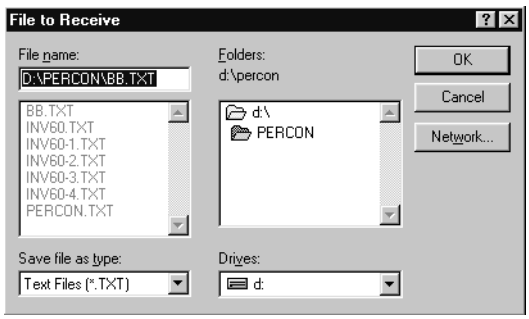
1. Connect the Percon unit to the workstation by doing one of these options:
   - Connect the cable provided with the Percon unit (15-pin to 9-pin) to the bottom of the Percon unit and the COM port on the back of the workstation.
   - Connect the Percon unit (with the PT Dock Adapter attached) to the PT Dock.
2. On your workstation, start the Percon Portable File Transfer utility.

   To do this, double-click the icon on your desktop. (For more information on where to find the icon, see your system administrator.)

   Windows displays the Percon Portable File Transfer window.
3. Choose **Options, Connect** to open the communications port on the workstation.

   Windows displays "-- Communications port opened. --" inside the Percon Portable File Transfer window.
4. Choose **File, Receive** to prepare the workstation for the transfer.

   Windows displays the File to Receive window:



5. Make note of the folder where the file will be stored so you can use that information to find the file when you process the information later.
6. Enter a file name in the **File name** field.
7. Press **ENTER** or click **OK**.

   The Percon Pro F T displays a waiting message while it waits for the file to transfer.

8 Do one of these options:

- If the Percon unit already shows the Inventory menu, skip to step 10.
- If the Percon unit does not already show the Inventory menu, press **F3** from the Main Menu to go to the Inventory menu.

9 On the Percon unit, press **F2** to go to the Send menu.

10 On the Percon unit, press **F3** to upload the barcodes to the workstation.

The Percon unit displays "Send Complete" and the Percon Portable File Transfer window displays a file received message.

11 On the Percon unit, press **F4** once or twice to return to the Main Menu.

> **NOTE**
>
> You might want to process the barcodes in Horizon before you delete the file from your Percon unit to make sure you do not need the file anymore. (For more information, see "Processing Uploaded Inventory Data in Horizon" on page 4-18.)

Processing Uploaded Inventory Data in Horizon

After you upload barcodes from a hand-held computer to a workstation, you must transfer the data to the Horizon server. This allows Horizon to process all the information from the inventory, regardless of the source. Once Horizon processes the files, you can generate reports and correct exceptions.

This section explains these topics:

- Processing Data from a Telxon Unit
- Processing Data from a Percon Unit

Processing Data from a Telxon Unit

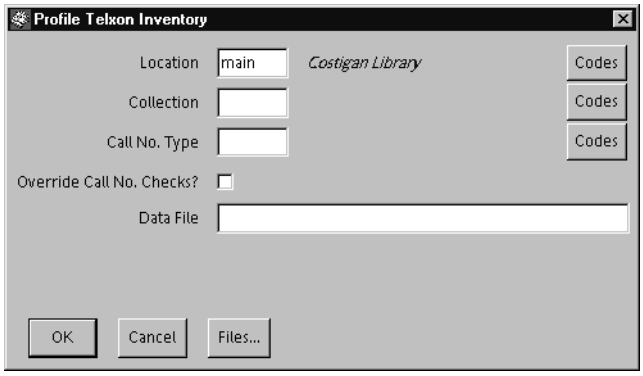
You will use the Telxon Inventory process to transfer the uploaded file to the Horizon server.

To process data from a Telxon unit

1 Start the **Telxon Inventory** process.

The default location of this process is the **Inventory** folder on the navigation bar.

Horizon opens the Telxon Inventory window, then displays the Profile Telxon Inventory window:

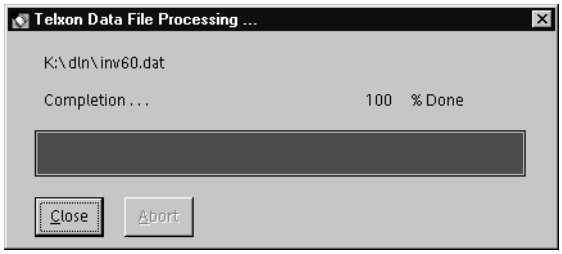


2 Complete or update these fields in the Profile Telxon Inventory window:

In this field	**Do this**
Location	Enter the location of the collection for which you want to process inventory data. For a list of valid locations, click **Codes**. (The Location field defaults to the location that you specified when you logged in.)
Collection	Enter the name of the collection. For a list of valid collection names, click **Codes**.
Call No. Type	Horizon sets the Call No. Type from the collection name. If you want, enter an alternate call number type if your library has set the Call Type field in the item record to override the default call number type set in the collection record. (For more information on setting the default, see "About Inventory Setup" on page 3-3.)
Override Call No. Checks?	If you do *not* want Horizon to report exceptions for missing call numbers, incorrect call number types, and misshelved items, then mark this box; otherwise, leave this box blank.
Data File	Enter the name of the file you uploaded from the Telxon unit to the workstation. If you need to browse for the file, click the **Files** button.

3 Click **OK**.

Horizon displays the Telxon Data File Processing window:



4 After the bar indicates 100 percent, click **Close**.

5 Do one of these options:

- If Horizon finds exceptions, the system displays an Exceptions Message window:

  When the session ID number displays, make note of it in case you need to print the Inventory Exceptions report just for that session, then click **OK**.

- If Horizon encounters no exceptions, Horizon returns to the Telxon Inventory workspace. Continue with step 7.

6 After Horizon has successfully processed the inventory file, erase the file from the Telxon unit. To do this, do these steps:

1 Press **3** at the Inventory menu on the Telxon unit. 2 Press **YES** to confirm the deletion.

7 If you want to process more files, choose **File, Profile Telxon Inventory**.

8 When you have finished processing all the files for this inventory session, run the exceptions reports and find missing inventory, as necessary.

(For instructions, see "About Resolving Inventory Issues" on page 5-3.)

Processing Data from a Percon Unit

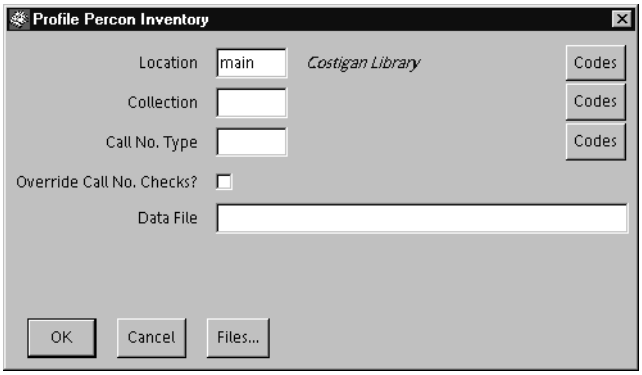
You will use the Percon Inventory process to transfer the uploaded file to the Horizon server.

To process data from a Percon unit

1 Start the **Percon Inventory** process.

The default location of this process is the **Inventory** folder on the navigation bar.

Horizon opens the Percon Inventory window, then displays the Profile Percon Inventory window:



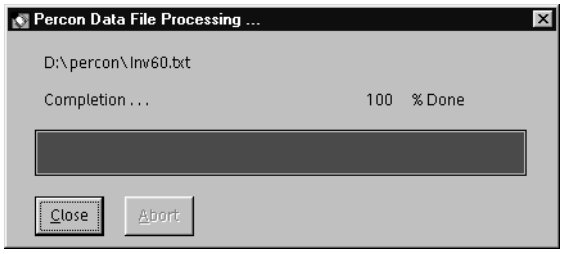
2 Complete or update these fields in the Profile Percon Inventory window:

In this field	Do this
Location	Enter the location of the collection for which you want to process inventory data. For a list of valid locations, click **Codes**. (The Location field defaults to the location specified during login.)
Collection	Enter the name of the collection. For a list of valid collection names, click **Codes**.
Call No. Type	Horizon sets the Call No. Type from the collection name. If you want, enter an alternate call number type if your library has set the Call Type field in the item record to override the default call number type set in the collection record. (For more information on setting the default, see "About Inventory Setup" on page 3-3.)
Override Call No. Checks?	If you do *not* want Horizon to report exceptions for missing call numbers, incorrect call number types, and misshelved items, mark this box; otherwise, leave this box blank.

In this field	Do this
Data File	Enter the name of the file you uploaded from the Percon unit to the workstation. If you need to browse for the file, click the **Files** button.

3 Click **OK**.

Horizon displays the Percon Data File Processing window:



4 After the bar indicates 100 percent, click **Close** to close the window.

5 Do one of these options:

- If Horizon encounters exceptions, the system displays an Exceptions Message window:

  When the session ID number displays, make note of it in case you need to print the Inventory Exceptions report just for that session, then click **OK**.

- If Horizon encounters no exceptions, Horizon returns to the Percon Inventory workspace. Continue with step 7.

6 After Horizon has successfully processed the inventory file, erase the file from the Percon unit. To do this, do these steps:

1 Press **F3** at the Inventory menu.
2 Press **F3** again to confirm the deletion.

7 Do one of these options:

- If you want to process more files, choose **File, Profile Percon Inventory**.
- If you want to turn off the Percon unit, press the **1/0** button, or leave it alone and it will turn itself off after 10 minutes.

8 When you have finished processing all the files for this inventory session, run the exceptions reports and find missing inventory, as necessary.

(For instructions, see "About Resolving Inventory Issues" on page 5-3.)

Chapter 5

Resolving Inventory Issues

While you take inventory, certain items will show as missing, misshelved, or some other exception. This chapter explains how to decide if inventory issues are valid and how to work with reports to fix those issues. You do not have to complete the entire inventory for your library before you resolve inventory issues.

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About Resolving Inventory Issues

After you take inventory and Horizon compiles the barcodes from all sources, you need to check for any exceptions or missing inventory. You can do this by running reports of exceptions discovered when you enter barcodes for your collections.

This chapter explains these topics:

- Running the Inventory Exceptions Report
- Finding Missing Inventory
- Running the Missing Inventory Report
- Running the Inventory Statistics Report

Running the Inventory Exceptions Report

The Inventory Exceptions report contains the exceptions (problems or errors) that Horizon encounters as you take inventory of a collection. Exceptions fall into two categories: misshelved items and other. (For a description of exceptions, see "Choosing Whether to Report Items as Exceptions" on page 3-4.)

If your library chooses not to report misshelved items, then the report contains only the other exceptions. (For more information about misshelved items and other exceptions, see "Creating or Editing Collection Inventory" on page 3-7.)

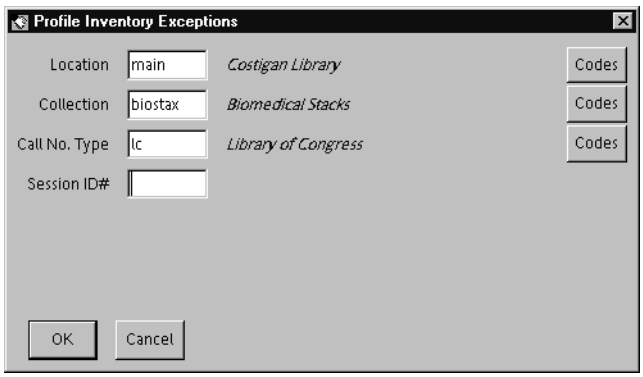
Resolve exceptions as soon as possible after printing the report, while the items are more likely to be on the shelves. If you took inventory using a workstation, Horizon might have displayed exception messages, prompting the person taking inventory to resolve some or all the exceptions at that time. (For more information, see "Taking Inventory at a Workstation" on page 4-6.)

To run the Inventory Exceptions report

1 Start the **Report Inventory Exceptions** process.

The default location of this process is the **Inventory** folder on the navigation bar.

Horizon opens the Inventory Exceptions window, then displays the Profile Inventory Exceptions window:



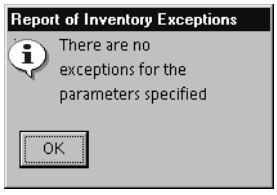
2 Complete or update these fields in the Profile Inventory Exceptions window:

In this field	Do this
Location	Enter the location for the collection, or click **Codes** for a list of valid locations. (The Location field defaults to the location specified during login.)
Collection	Enter the name of the collection, or click **Codes** for a list of valid collection names.
Call No. Type	Horizon sets the call number type from the collection name. If the inventory occurred on a subset of the collection with a different call number type, enter the correct call number type to override the default.
Session ID#	Enter the session ID number for which you want to report. This limits the report to those exceptions gathered for a particular inventory session. This is particularly useful for libraries where several people take inventory on different ranges of the same collection. NOTE If you specify a session ID number when running the report, Horizon clears only the exceptions associated with that session ID number when you clear exceptions after running the exceptions report. If you specify *no* session ID number in this field when the report is generated and all the exceptions are displayed in the report, Horizon deletes all the exceptions for the inventory.

3 Click **OK**.

Horizon shows the exceptions.

If Horizon finds no exceptions for the location, collection, call number type, and session ID number specified for the report, Horizon displays this window:

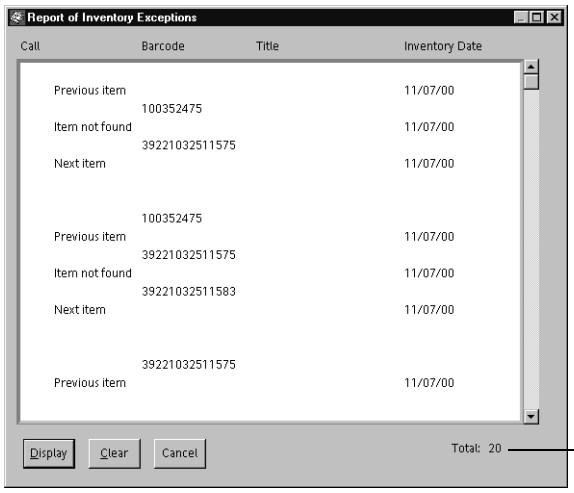


4 Click **OK**.

5 Do one of these options:

- To run a report with a different set of parameters, repeat steps 2 and 3.
- If you are finished running reports, close the Profile Inventory Exceptions window.

If Horizon finds exceptions for the parameters specified, Horizon displays the Report of Inventory Exceptions window:



The Total includes only the total number of exceptions, without including the "Previous item" and "Next item."

6 Do one of these options:

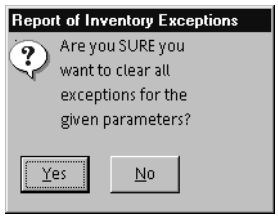
- Print the report.
- Save the report.

IMPORTANT

In the next step, you click the Clear button to delete exceptions from the exceptions table on your Horizon server. Once Horizon deletes the exceptions from the exceptions table, the system cannot retrieve them.

7 Click **Clear** to delete the exceptions from the table.

Horizon displays this window:



IMPORTANT

Horizon will delete all exceptions shown on the exceptions report. Be sure you want to do this before you click **Yes**.

8 Click **Yes**.

9 Continue with "Finding Missing Inventory" on page 5-6.

Finding Missing Inventory

You can identify which items were not inventoried by generating a report that shows the number and percentage of items that were not included in the inventory count or were not being circulated during the inventory. You must run this report before the system considers the inventory complete for a collection.

You can use the Find Missing Inventory option in two ways:

- As you are still taking inventory, you can generate a report without resetting statuses. As you continue taking inventory on the same collection, you can generate another statistical report as often as you want. After you have finished taking inventory, you can run the Find Missing Inventory option without clicking the Stats Only button to change item statuses to "mi" (Missing Inventory).
- When you are finished taking inventory on a collection, you can generate a final statistical report which updates item statuses. Horizon changes the status automatically by identifying which items were not included in the inventory count or were not being circulated during the inventory, then resets the item status on all those items with a status of "i" (Checked In) to "mi" (Missing Inventory) if that item also has one of these condition combinations:

This condition		Combined with this condition
Horizon has nothing recorded for the last inventory date.	and	Horizon has nothing recorded for the last status update date.
Horizon has nothing recorded for the last inventory date.	and	The last date the item's status was updated is before the inventory start date.
The last inventory date is before the inventory start date.	and	The last date the item's status was updated is before the inventory start date.
The last inventory date is before the inventory start date.	and	Horizon has no date recorded for the last status update date.

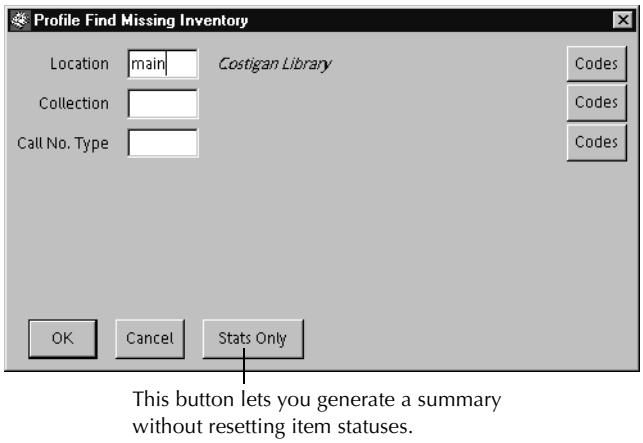
Horizon does not change items with other statuses, such as "l" (Lost) or "c" (Claimed Returned), as those items would not have been expected to be on the shelf during inventory.

To find missing inventory

1 Start the **Find Missing Inventory** process.

The default location of this process is the **Inventory** folder on the navigation bar.

Horizon opens the Find Missing Inventory window, then displays the Profile Find Missing Inventory window:



2 Complete or update these fields in the Profile Find Missing Inventory window:

In this field	Do this
Location	Enter the location for the collection. For a list of valid locations, click **Codes**. (The Location field defaults to the location specified during login.)
Collection	Enter the name of the collection. For a list of valid collection names, click **Codes**.
Call No. Type	Horizon sets the Call No. Type from the collection name. Your library might have set the Call Type field in the item record to override the default call number type set in the collection record. If necessary, enter an alternate call number type. (For more information about setting the default, see "About Inventory Setup" on page 3-3.)

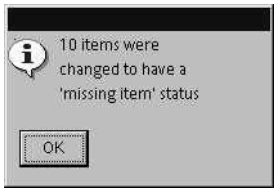
3 Do one of these options:

- If you want to see the statistical report without resetting item statuses, click **Stats Only**, then click **OK** to generate the report.
- If you are ready to get the final statistical report and reset statuses, then click **OK** to generate the report.

> **NOTE**
>
> Run Find Missing Inventory without using the Stats Only button only after you take inventory on the entire collection; otherwise, the system will count the items on the shelf in the collection that were not counted as Missing Inventory and will change the item status to "Missing."

Horizon updates the item status of all the items in the database for that location, collection, and call number type combination.

Horizon displays this window:



4 Click **OK**.

5 Take note of the "missing item" count.

6 Click **Cancel** to close the Find Missing Inventory window.

Running the Missing Inventory Report

You can do a compound search for missing inventory by running the Missing Inventory report. This option searches for missing inventory based on settings your library set in Item Status and other criteria. You can do a compound search with Boolean operators to search on more than one criterion at a time.

(For example, you can search for all items in a given location, collection, and call number type where the item status is "mi" [Missing Inventory] and the last date the item's status was updated is the complete date of the inventory.)

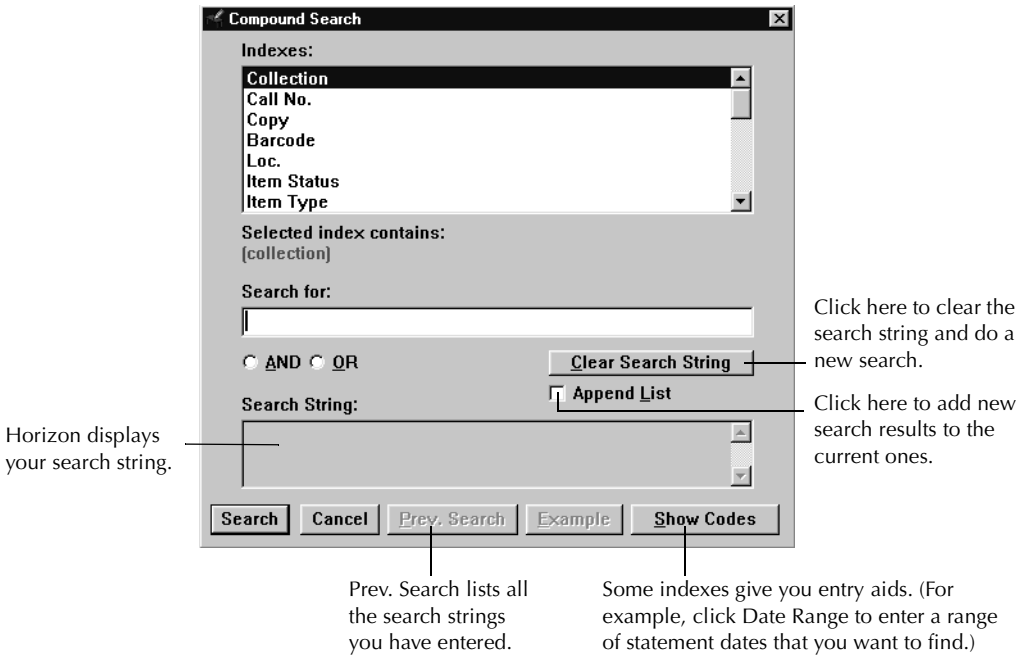
> **NOTE**
>
> Horizon changes the date of the item's last status update when it changes an item's status to "mi." Horizon can use the date in this field to profile the search and limit those items with a status of "mi" that were changed because of the most current inventory.

To run the Missing Inventory report

1. Start the **Report Missing Inventory** process.

   The default location of this process is the **Inventory** folder on the navigation bar.

   Horizon opens the Compound Search window:



2. Highlight the index you want to search.
3. Enter a search term in the **Search for** field.

   (For example, to display items from the biostax collection, enter "biostax" in the Search for field.)

4 If you want to do a compound search, use the steps in this table; otherwise, skip to step 5:

1 Do one of these options: • Mark **AND** to narrow a search. • Mark **OR** to broaden a search. 2 Highlight a search index from the list of indexes. 3 Enter another search term in the **Search for** field. 4 If you want to add new results to the current ones, click **Append List**. 5 Repeat steps 1 through 4 in this table until your search string is complete. Horizon displays your search string as you enter it. You can enter up to 300 characters.

NOTE

For the search to work best, leave the last search term of the series in the **Search for** field.

5 Click **Search**.

Horizon displays the List Item Reporting window.

6 If necessary, do one or more of these tasks:

To do this	Do this
Change which columns Horizon sorts.	Click **Sort**. (For more information, see "Sorting a List Window" in the "Horizon User Interface" chapter of the *Horizon Basics Guide*.)
Add or subtract columns from the view.	Click **Display**. (For more information, see "Changing Columns in a List Window" in the "Horizon User Interface" chapter of the *Horizon Basics Guide*.)
Print a paper copy of the report on your system printer.	Choose **File, Print**. (For more information on printing, see your Microsoft Windows guide.)
Save the list to any file name you choose anywhere you have the proper rights.	Choose **File, Save to File**, then choose a path and enter a file name. (For more information, see "Saving Data to a File" in the "Basic Tasks" chapter of the *Horizon Basics Guide*.)

To do this	Do this
Save the group for future reference after you select which items from the list you want saved.	Choose **Group, Create Group**.
Upload a previously saved group.	Choose **Group, Retrieve Group**.
Delete a previously created group.	Choose **Group, Delete Group**.

Running the Inventory Statistics Report

You can run the Inventory Statistics report to identify the number of items inventoried and the number of items that had incorrect statuses when inventoried. The report can also include the number of misshelved items if your library set up collections to do so.

(For more information about setting Horizon to report misshelved items, see "Choosing Whether to Report Items as Misshelved" on page 3-6.)

To run the inventory statistics report

1 Start the **Inventory Statistics Report** process.

The default location of this process is the **Inventory** folder on the navigation bar.

Horizon displays the List Inventory Statistics Report window.

> **NOTE**
>
> If Horizon displays a Compound Search window, you need to complete a search to limit the number of items in the report. (For instructions, see "Doing a Compound Search" in the "Searching" chapter of the *Horizon Basics Guide*.)

2 If necessary, do one or more of these tasks:

To do this	Do this
Change which columns Horizon sorts.	Click **Sort**. (For more information, see "Sorting a List Window" in the "Horizon User Interface" chapter of the *Horizon Basics Guide*.)
Add or subtract columns from the view.	Click **Display**. (For more information, see "Changing Columns in a List Window" in the "Horizon User Interface" chapter of the *Horizon Basics Guide*.)

To do this	Do this
Print a paper copy of the report on your system printer.	Choose **File, Print**. (For more information on printing, see your Microsoft Windows guide.)
Save the list to any file name you choose anywhere you have the proper rights.	Choose **File, Save to File**, then choose a path and enter a file name. (For more information, see "Saving Data to a File" in the "Basic Tasks" chapter of the *Horizon Basics Guide*.)
Save the group for future reference after you select which items from the list you want saved.	Choose **Group, Create Group**.
Upload a previously saved group.	Choose **Group, Retrieve Group**.
Delete a previously created group.	Choose **Group, Delete Group**.

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